

ORLEANS PARISH SCHOOL BOARD

CHARTER SCHOOL APPLICATION RECOMMENDATION REPORT 2018

National Association of Charter School Authorizers

November 5, 2018

New Charter School Application for

Opportunities Academy

Submitted by

Collegiate Academies

Evaluation Team

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INTRODUCTION

Across New Orleans, more than 90 percent of public school students currently attend charter schools. These schools have led to a dramatic increase in the number of students meeting academic proficiency standards and the performance gap between students in Orleans Parish and Louisiana as a whole has dramatically decreased over the last 12 years.

Despite these gains, additional progress is needed. Every student deserves high quality schools where their interests will come first, where they and their families will have choice, and where educators will have the tools and support they need to be successful.

The Spring 2018 charter school application process seeks proposals from highly qualified applicants to open new Type 1 charter schools and transform existing district-run schools into Type 3 charter schools.

Focus on Quality

The 2018 Request for Proposals and the resulting evaluation process are rigorous and demanding. The process is meant to ensure that approved charter school operators possess the capacity to implement a school model that is likely to dramatically increase student outcomes. Successful applicants will demonstrate high levels of expertise and capacity in the areas of curriculum and instruction, school finance, educational and operational leadership, and non-profit governance, as well as high expectations for excellence in student achievement and professional standards. An application that merits a recommendation for approval will present a clear, realistic picture of how the school expects to operate; be detailed in how this school will raise student achievement; and inspire confidence in the applicant's capacity to successfully implement the proposed academic and operational plans.

Evaluation Process

For the 2018 RFP cycle, OPSB partnered with the National Association of Charter School Authorizers (NACSA) to manage the application process and to provide independent, merit-based recommendations regarding whether to approve or deny each proposal. NACSA assembled an independent evaluation team that included both national and local expertise related to charter school start-up and operation. This report from the evaluation team is a culmination of three stages of review:

PROPOSAL EVALUATION

The evaluation team conducted individual and group assessment of the merits of the proposal based on the complete written submission. In the case of experienced school operators, OPSB and NACSA supplemented this written evaluation with due diligence to verify claims made in the proposal related to past performance.

CAPACITY INTERVIEW

After reviewing the application and discussing the findings of their individual reviews, the evaluation team conducted an in-person interview to assess the team's overall capacity to implement the proposal as written in the application.

CONSENSUS JUDGMENT

Following the capacity interview, the evaluation team came to consensus regarding whether to recommend the proposal for approval or denial. The duty of the evaluation team is to recommend approval or denial of each application based on its merits against OPSB-approved evaluation criteria. The authority and responsibility to decide whether to approve or deny each application rests with the members of OPSB.

Report Contents

This evaluation report includes the following:

PROPOSAL OVERVIEW

Basic information about the proposed school as presented in the application.

RECOMMENDATION

An overall judgment regarding whether the proposal meets the criteria for approval.

EVALUATION

Analysis of the proposal based on four primary areas of plan development and the capacity of the applicant team to execute the plan as presented:

School: academic model and schedule, LEA status, special student populations, goals and metrics, enrollment plans, school culture, and family and community engagement.

People: founder's submission, governing board, staff, mission critical partners, and education service providers.

Operations: start-up plan, facility, budget, and financial readiness.

EVALUATION: ADDENDA

For applicants on the existing or experienced operator tracks, applicants that are or will form a corporate partnership, schools whose primary instructional environment is computer-based or virtual, applicants seeking or potentially willing to seek a match to operate an existing Orleans public charter school or school facility, or applicants seeking to start, transform or convert a school serving Grades 9-12, an analysis of:

Experienced Operator Addendum (if applicable): past school performance, growth plan, scale strategy, and risks and associated contingency plans.

Corporate Partnership Addendum (if applicable): corporate partnership formation, corporate partner track record, legal relationships, and organizational structure.

Virtual School Addendum (if applicable): location, educational program, instructional staff, state and federally mandated services, evaluation and assessment, school operations, and parent and community involvement.

Transformation Addendum (if applicable): transformation overview, operator track record, educational program, school operations, metrics and goals, and community engagement.

High School Addendum (if applicable): state and district graduation standards, supporting success for all students – truancy prevention, remediation and intervention, ensuring college and career readiness, and strong start – 9th grade transition plan.

RATINGS CHARACTERISTICS

Evaluation teams assess each application against the published evaluation criteria. In general, the following definitions guide evaluator ratings:

Meets the Standard

The response reflects a thorough understanding of key issues. It addresses the topic with specific and accurate information that shows thorough preparation; presents a clear, realistic picture of how the school expects to operate; and inspires confidence in the applicant's capacity to carry out the plan effectively.

Meets the Standard with Reservations

The response meets the criteria in many respects, but lacks detail and/or requires additional information in one or more areas.

Approaches the Standard

The response meets the criteria in some respects but has substantial gaps in a number of areas

Does Not Meet the Standard

The response is wholly undeveloped or significantly incomplete; demonstrates lack of preparation; or otherwise raises substantial concerns about the viability of the plan or the applicant's ability to carry it out.

PROPOSAL OVERVIEW

Applicant Name:

Collegiate Academies

Proposed School Name:

Opportunities Academy

Mission:

The mission of Collegiate Academies is to build world-class public schools that prepare all students for college success and lives of unlimited opportunity.

Proposed Location:

To be determined.

Enrollment Projections:

<i>Academic Year</i>	<i>Planned # Students</i>	<i>Maximum # Students</i>	<i>Grades Served</i>
2018-19	0	0	12
2019-20	75	125	12
2020-21	100	125	12
2021-22	100	125	12
2022-23	100	125	12
At Capacity	100	125	12

SECTION RATINGS

Opportunities Academy

Recommendation:

Denial

Summary of Section Ratings:

Opening and maintaining a successful, high-performing charter school depends on having a complete, coherent plan and identifying highly capable individuals to execute that plan. It is not an endeavor for which strengths in some areas can compensate for material weaknesses in others. *Therefore, in order to receive a recommendation for approval, the application must Meet the Standard in all areas.*

SCHOOL

Approaches the Standard

EXPERIENCED OPERATOR ADDENDUM (IF APPLICABLE)

Meets the Standard with Reservations

PEOPLE

Approaches the Standard

TRANSFORMATION ADDENDUM (IF APPLICABLE)

N/A

OPERATIONS

Meets the Standard with Reservations

SCHOOL

Opportunities Academy

RATING:

Approaches the Standard

Plan Summary:

Collegiate Academies has proposed a high school designed to serve students ages 18-21 with intellectual and developmental disabilities. The school plans to open in 2019 with 75 students in Grade 12 and grow to 100 students at full capacity. The educational program design focuses on career and independent living goals through internships and externships, and direct instruction for employability and community access skills. Supports will be highly individualized and tailored to each student's goals and needs. The school culture will be characterized by celebrations of growth, consistent recognition of success, and developmentally appropriate support rather than punishment.

Analysis:

The School section approaches the standard.

The academic model and schedule met the criteria in some respects but had substantial gaps. For example, the applicant clearly identified the educational program purpose: to provide innovative transition programming for students ages 18-22 with mild to significant disabilities. The needs of this population were detailed and supported by data. The applicant provided further detail during the interview describing how the program will be implemented. However, neither a research base for the proposed program nor proposed curricula nor a specific assessment plan was included. The application included a strong professional development plan, with particular attention to developing a pipeline of future school leaders.

The applicant's goals for overall student achievement were not provided. This was a great concern to the review team because without clear and specific goals for student performance, there is no evidence that the applicant will be able to determine the quality and success of their program. The lack of goals was addressed during the interview as both the school leader and board chair stated that overall student achievement goals for the school have not yet been established.

The greatest concern in this section was that the application did not provide a clear, comprehensive, and detailed plan describing how all students with special needs will succeed. Specifically, not all required elements regarding serving students with disabilities were addressed, such as IEP development; monitoring progress; programs, strategies, and related services; etc. Therefore, the application lacks evidence of the applicant's knowledge, plans, and capacity. Similarly, a comprehensive, well-developed plan for serving English Language Learners (ELLs) was not provided.

The applicant provided detailed student experience plans. For example, the application clearly described the proposed school culture, including school values, and the plan for investing staff in that culture. Additionally, the applicant described a discipline plan during the interview that is reflective of best practices and aligned with their student culture plan.

PEOPLE

Opportunities Academy

RATING:

Approaches the Standard

Plan Summary:

Collegiate Academies has a governing board of 12 people with backgrounds in academics, finance, legal issues, management and operations, and community relations. Board members receive training and information from partners such as Louisiana Association of Public Charter Schools in order to remain informed.

The school leader will be James Lukens. Mr. Lukens holds two Master's degrees: Special Education, and Public Health and Topical Medicine. He completed the Relay Graduate School of Education's National Principals Academy, New Schools for New Orleans' Personalized Learning Fellowship, and Collegiate Academies' School Leader Fellowship. The school leadership team also includes the director of curriculum and instruction, and director of operations, supported by the organization's chief executive officer, chief operating officer, chief academic officer, senior director of scholar supports, and chief of talent.

Collegiate Academies works with a range of service providers and partner organizations to maximize impact with students and families, including the Institute of Women and Ethnic Studies and Delgado Community College.

Analysis:

The People section approaches the standard. The responses meet the criteria in some respects but have substantial gaps in a number of areas.

The applicant has a well-developed board with a broad range of expertise. However, the applicant has not provided evidence that the school will achieve its student goals if the school leader satisfies the standards set forth by the board. First, student goals are not yet identified. Second, although it is evident that the board understands the responsibility to evaluate the organization's leader, specific information about the evaluation plan was not provided.

Board structures are not clearly stated and the process for board selection was not described in detail. The application stated that the board would hold "regular meetings" (page 21) but did not state the frequency or provide a calendar. The application said that the board will "elect or appoint committees" (page 22) but it is unclear if any standing committees exist or are planned. The applicant did not provide a board development timetable, specific topics to be addressed, or requirements for board member participation.

It was concerning that the applicant declined to participate in the performance task during the interview because the review team was unable to observe how team members interact and cooperate to solve problems collectively. The board chair stated that the scenario posed for the performance task (i.e. response to the school leader's resignation during winter break) would never happen because the organization has a "deep bench" and the board does not get involved in school-level decisions. While it is appropriate for a board to not overstep into school management, it would be appropriate for the board to have questions regarding this situation in an oversight capacity.

The applicant provided a detailed process for staff hiring and a comprehensive plan for communicating expectations to teachers. However, the overall staffing plan is not clear. The application included an organizational chart, staffing plan, and job descriptions. Yet, there is a lack of alignment among these attachments and with staff positions in the budget. The application described pipelines for teacher recruitment but did not provide data to demonstrate that a sufficient pool exists. The application addressed teacher qualifications but it raised concerns because the list of qualifications did not specify professional credentials. The proposed school leader has experience managing a team of teachers and academic program but the applicant has not provided evidence that the proposed school leader has established a track record of effectiveness.

OPERATIONS

Opportunities Academy

RATING:

Meets the Standard with Reservations

Plan Summary:

The applicant will participate in OPSB's siting process for securing a facility while, at the same time, conducting feasibility assessments for at least five potential properties currently owned by the City of New Orleans.

Financial responsibilities for the school will be handled by the business manager. Financial statements will be audited annually by an independent audit firm. The board will approve the selection of the firm to conduct the annual audit.

The start-up budget includes \$525,000 from the Walton Family Foundation. The majority of expenditures are allocated for salaries and classroom materials. The CMO fee is 12.5 percent of recurring public revenue and will include financial services and accounting, operations support, facilities and shared services, talent recruitment, related services for students with disabilities, fundraising support, professional development, and leadership coaching.

Analysis:

The Operations section meets the standard with reservations.

The applicant has an appropriate and realistic facilities plan. The applicant stated in the Request for Clarification that the school will participate in the OPSB siting process and anticipates that a decision will be made by mid-October 2018. The applicant also provided a viable back-up plan in the event that a facility is not provided; that plan includes applying again in the next round in addition to pursuing five alternative properties that have already been identified. The application clearly addressed desired facility characteristics in the clarification to include student access and ADA compliance; suitability of spaces with up to 12 classrooms, offices, and space for assisted restrooms; co-location with select partners such as a business or two-year college; ability to enterprise such as a kitchen or storefront with proximity to customer traffic; and central location in the city.

The applicant provided specific information related to meeting state, local, and OPSB standards for facility safety and maintenance, and adhering to occupancy and fire/life safety codes and ADA standards. This clearly demonstrates the applicant's knowledge and ability in these areas.

The applicant's financial readiness plans are clear in some respects. For example, the applicant protects mission-critical expenses when faced with budget cuts. If revenue is not sufficient, a detailed analysis will be conducted to determine the most appropriate areas for cost cutting, focusing on central office cuts first and minimizing impact on students. The school described appropriate and relevant roles for the governing board, CMO/organizational leadership, and the school site leadership in the budgeting process. The applicant described appropriate accounting and control systems that include strong checks, balances, and segregation of duties. It is evident that the board has sufficient plans to select an audit firm in keeping with Louisiana requirements and a clear understanding of the role of the audit firm.

Additional detail is needed in some areas of the applicant's financial readiness plan. For example, the start-up plan did not address all essential tasks, such as finalizing curriculum, transportation, and food service; procuring furniture, fixtures, and equipment; and ordering instructional materials. Additionally, the financial services plan is not clear. Two people are identified in the attachments (11) but the roles and financial responsibilities of these people are not described.

EXPERIENCED OPERATOR ADDENDUM (IF APPLICABLE)

RATING:

Opportunities Academy

Meets the Standard with Reservations

Plan Summary:

Collegiate Academies anticipates serving a demographically similar student population to the current schools: more than 99 percent students of color, nearly 90 percent from economically disadvantaged backgrounds, and 8 to 10 percent ELLs. The CMO currently operates five schools and has a pending Type 2 charter application with the Board of Elementary and Secondary Education for a high school in East Baton Rouge Parish and an approved Type 1 Grade 9-12 fresh-start charter with the Orleans Parish School Board.

The network structure includes a chief executive officer, chief academic officer, director of special education, and chief financial and operating officer. Network growth will be supported with leader training, staff orientation, network support, and consistent feedback and refinement.

Analysis:

The Experienced Operator section, including plans for growth, scale strategy and risk mitigation, and staffing, meets the standard with reservations.

The applicant clearly described effective plans to scale the model beyond their current schools that does not risk destabilizing nor negatively impacting performance at existing schools. Threats identified by the applicant may threaten the organization's ability to achieve its mission but corresponding contingency plans are likely to mitigate those threats. For example, one potential threat to success is the availability of an effective school leader. To mitigate this threat, a school leader has already been hired and, in the event that another leader is needed, the applicant has a School Leadership Fellowship (SLF) program that develops leaders within the organization and ensures that well-prepared school leaders are in the pipeline. The applicant provided appropriate contingency plans in the event revenues are lower than estimated. The applicant provided required information regarding the organizational chart and job descriptions. The individuals identified and the job descriptions are inclusive of the experiences necessary to effectively implement the operator's scale strategy. The applicant also provided a clear description of effective succession planning.

The applicant described the target student population but did not provide data to show demand. Therefore, it is unclear if student population projections are realistic and attainable, which in turn may affect the proposed budget and program.

EVALUATOR BIOGRAPHIES

Evaluator's Name

Dr. Iris Palazesi

Dr. Palazesi is an independent education consultant specializing in the areas of charter school applications, grant applications, and educational research. She has worked with clients to secure more than \$21 million in grant awards and more than 80 approved charter school applications. Dr. Palazesi served on the board of directors of a high-performing charter school in Tallahassee, Florida, for nine years, including four years as board chair. Dr. Palazesi has also worked for the Florida Department of Education as Program Specialist for Gifted Students, Supervisor of Exceptional Student Education Services, and Interim Administrator for Title I. Prior to moving to Florida, Dr. Palazesi was a university professor at Ball State University in Muncie, Indiana, and Thomas University in Thomasville, Georgia. Dr. Palazesi earned her Bachelor degree in Elementary Education from the University of Illinois ; her Master degree in Gifted Education from Northeastern Illinois University in Chicago; and her Doctorate degree from the University of Illinois.

Evaluator's Name

Wanda Guillaume

Wanda Guillaume is an educational consultant providing support to schools and districts in the areas of instructional and leadership coaching, professional development, and school and district turnaround. In addition, she collaborates with state and local education agencies to offer charter school evaluation and recommendation expertise for authorizers in need of internal capacity to assess the organizational, operational, and educational rigor of charter school applications. Wanda has served as a teacher, principal and chief academic officer, and is a leader in building capacity among school leadership teams and developing innovative strategies to turn around failing schools. She holds a Bachelor in Elementary Education from Loyola University, a Master of Education in Curriculum and Instruction and Educational Administration from the University of New Orleans, and holds an Educational Leader Level 3 certification for the State of Louisiana.

Evaluator's Name

Anthony Oliver

Anthony Oliver is currently an assistant principal in the Jefferson County School System in Birmingham, Alabama. Most recently, Anthony served as executive director at Breakthrough Birmingham, an education nonprofit dedicated to providing high-quality academic programming to underserved students and preparing the next generation of teachers. Anthony has also served as a high school mathematics teacher and coach, and has worked as a principal intern at Newton North High School where he worked to create access to challenging academic curriculum for African American students and students from low socioeconomic classes. Anthony holds a Bachelor in mathematics from the Virginia Military Institute, an Master in secondary education - mathematics curriculum and instruction from the University of Alabama at Birmingham, and a Master of Education in school leadership from the Harvard Graduate School of Education.